



The American Association of Electronic Reporters and Transcribers

AAERT Strategic Plan
September 2012

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AAERT Strategic Plan June 2012

Document: AAERT – Strategic Plan June 2012

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AAERT Strategic Plan 2012

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1.0 Introduction

The American Association of Electronic Reporters and Transcribers ("AAERT") is a professional association formed in 1993 to support businesses and individuals engaged in electronic reporting and transcription of court and other legal proceedings. The AAERT Board of Directors created a Planning Task Force ("PTF") in 2010 to help the association develop a strategic plan. The goal of the PTF is to provide AAERT with a view of the current state of the industry and guidance as to how the association can grow and prosper in this rapidly changing environment.

This plan was developed with involvement and guidance from the AAERT Board of Directors. The PTF included five general AAERT members and two board members. In 2010 and 2011 the PTF conducted membership surveys, analyzed member demographics, researched other industry related associations, researched trade journals, and gathered information about the use of digital reporting in the courts, agency hearing rooms, and the private market. This document is the result of the research conducted and the hard work of PTF members and the AAERT Board of Directors.

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2.0 Executive Summary

AAERT Mission Statement

The American Association of Electronic Reporters and Transcribers provides education and certification for professionals engaged in digital reporting, transcribing, and associated roles. AAERT offers networking opportunities for its members and promotes public awareness about the value of digital reporting.

Background and History

AAERT was created in 1993 to support individuals and small businesses involved in the recording and transcribing court proceedings, agency hearings, and depositions. The

association was originally incorporated in Sacramento, California by Connie Rill, Steve Townsend, and Janet Harris.

The first AAERT annual conference was held in Las Vegas in June of 1994. The board of directors at the time included the three original incorporators named above and Jim Bowen (New Jersey), Sunny Peer (Texas), Bill Wagner (Washington), and Gloria Kron (Alaska).

In the mid-1990s, the association launched its first certification initiative. Over the years, AAERT certification has matured and become well accepted as the standard for digital reporting and transcription professionals. As certification matured and digital reporting became increasingly prevalent in the courts, AAERT's reputation grew. The association is now well recognized and respected in court systems around the country and the world.

The association is financially stable and has grown over the years, but not at a spectacular rate. In 2010, the Board of Directors asked a group of members to create a task force to help develop a strategic plan for AAERT. This document is the result of that planning process.

State of the Industry

The planning task force completed an environmental scan in 2010 and 2011 that included member surveys, analysis of member demographics, a review of other associations in the industry, and a comprehensive scan of trade journals and other media for information regarding current court reporting issues.

The research provided powerful evidence that the industry is in the midst of a very significant transition. Over the last two decades the number of stenographic reporters coming into the industry has declined dramatically. At the same time, courts across the country have become increasingly accepting of digital audio and video recording methods as the standard for recording proceedings.

The task force segmented the court reporting market into three focus areas: courts, administrative agencies, and freelance (depositions). Based on member surveys, it is clear that current AAERT membership is most active in the court segment and that most of the turbulence, which creates opportunity for AAERT members, is also in the court market.

Evidence indicates that even though the number of stenographic reporters working in the courts declines, those individuals have managed to hold on to those courtrooms that produce the most transcript demand, and thus the most revenue. This has created a demand curve where 80% of the courtrooms use some form of audio or video recording while only generating 20% of the transcript demand. On the other hand, official stenographic reporters report in only 20% of the courtrooms, but control 80% of the transcript demand.

A confluence of factors -- the decline of stenographic reporters, the general acceptance of digital reporting, and the current budget crisis in courts around the country -- is accelerating the pace of change. The market has now reached the point where audio/video recording is being implemented in the higher transcript demand courtrooms.

The trend seems consistent and irreversible and the implication for AAERT is that reporting and transcription opportunities for its members will grow exponentially over the next few years.

Direction and Results

The strategic direction and goals included in this plan are AAERT's response to its understanding of what members value most about the association and the current opportunities and challenges presented by the rapidly changing digital reporting markets.

With a fresh perspective on its mission, understanding what its members value, and the environment in which it operates, AAERT will pursue the following strategic directions:

1. Expand education and certification
2. Innovative and plentiful professional networking opportunities
3. Public awareness and government relations campaigns

Member Participation, Goals, and Objectives

The specific goals and objectives that will be pursued as the organization follows the strategic directions defined above will be developed through AAERT's committee structure. The association has a number of existing committees; among them are:

Education

The Education Committee identifies subject matter and designs and produces educational material that reach beyond certification to create further comprehension and professionalism in the fields of electronic reporting and transcribing.

Certification

The Certification Committee provides AAERT members electronic/digital court reporter and transcriber certification testing. The committee scores the certification tests using a two-step process and updates all certification-related materials.

Communications

The Communications Committee reports on events and happenings within the association as well as within the industry, by research or two-way communication (interviewing and story-telling); to alert members about upcoming events; to report on "how to" insights, techniques, procedures, software, hardware, processes to strengthen member knowledge and expertise; to build AAERT community and excitement; and to promote AAERT as the premier association for digital reporting and transcribing.

Conference Committee

The Conference Committee explores the viability of regional workshops and organizes content and locations, researches possible re-design of the AAERT annual conference, and secures AAERT annual conference speakers and session topics.

Government Relations

The Government Relations Committee represents, promotes, and advocates for the interests of the association regarding policies, laws, regulations, and other developments that may affect the association and its membership.

The Government Relations Committee monitors federal and state legislative, regulatory, and judicial developments that may affect the association and advises the association board and the membership about these issues.

In response to identified issues or proposed legislation, the Government Relations Committee contacts and informs policy makers at the national and state levels to educate and promote the interests of the association.

Membership

The Membership Committee identifies and reviews membership value, needs, and benefits, and explores ways to retain, promote, and increase membership.

3.0 AAERT Vision Statement

Within the next 20 years, digital reporting will be the standard method of capturing the verbatim record of legal events. Audio and video recording technology has progressed significantly and voice recognition is increasingly viable and cost effective. However, there remains a valuable and important role for professionals involved in recording events and converting those recordings to an accurate and timely written transcript.

AAERT is the leader in identifying needs and bringing together critical resources and services for all of its members engaged in the profession of digital reporting.

Specifically AAERT:

- Offers a range of professional certifications that are recognized by all courts and the legal community as a demonstration of a member's commitment to best practices, professional ethics, and continuous education;
- Offers members continuing education opportunities on a range of issues critical to their success in the industry, including best practices for digital reporting and transcription, technology advancements, and professional ethics;
- Facilitates professional networking between members and other legal professionals and vendors. Networking opportunities are facilitated both online and in person;
- Speaks for its members by advocating the use of the most efficient and effective methods of capturing and archiving an accurate verbatim record as technology advances and the legal industry changes.

While membership dues remain a key source of funding, other funding sources are increasingly important. Certification, continuing education, national and regional conferences, and vendor sponsorships all contribute revenue that allows the association to maintain reasonable membership dues and is valuable to its members.

4.0 AAERT Mission Statement

With this strategic plan, AAERT introduces a new mission statement:

The American Association of Electronic Reporters and Transcribers provides education and certification for professionals engaged in digital reporting, transcribing, and associated roles. AAERT offers networking opportunities for its members and promotes public awareness about the value of digital reporting.

This statement defines the association's members and clarifies the valuable services AAERT will provide its members.

AAERT intends to focus its resources on serving individuals who are involved in the production of an accurate verbatim record of legal proceedings, formal hearings, and depositions by:

- capturing the record using digital audio and video recording equipment;
- transcribing the audio recordings;
- proofreading the written transcripts;
- managing other individuals that perform these services; and
- teaching others that perform these services, and any individual, business, or governmental agency that supports the provision of these services.

AAERT's primary purpose is to provide professional certifications and education for its members. Additionally, the association is committed to providing valuable networking opportunities for its members. Networking facilitates personal interaction between professionals involved in the industry and occurs both online and in person.

Lastly, the association commits to promoting the value of digital reporting. This promotion will be to the broader legal community, the trade media, legislatively, and to the individuals who may be interested in entering the profession. AAERT's effectiveness in acting as the industry promoter will be based on the association's credibility as the gathering place for the true leaders in digital reporting.

5.0 Core Operating Values

As a foundation of its work in the industry and service to its members, AAERT holds these core values:

Technology Advancement and Market Analysis: Technology advancement is inevitable and valuable. Professionals who embrace technology offer the greatest value to their clients and achieve the greatest personal success. By being informed about technology, industry changes, strengths, and weaknesses, members can compete in all market segments.

Certification and Continuing Education: Offering a comprehensive certification and continuing education program for digital reporters and transcribers is essential to professional excellence and to a healthy, prosperous industry.

Collaboration: Collaboration on all levels among reporters, transcribers, court administrators, attorneys, and other legal professionals in both the public and private sectors promotes an efficient exchange of ideas, builds teamwork, leads to greater

understanding in all aspects, and results in an increased capacity to deliver quality services.

Networking: Networking through AAERT website, forums, annual conferences, regional meetings, and social media enables members and vendors to communicate with one another, exchange ideas, and build strong professional relationships.

Integrity: Honesty is AAERT's most respected value, which strengthens the association's operating culture, directors and officers, volunteers, and key activities.

Advocacy: Advocating for members to support new state legislation or to oppose unfair legislation is vital to the protection and expansion of our industry. Members are supported and encouraged to be proactive and organized in their local environment.

6.0 Customers

AAERT exists to serve its customers. It is imperative that its board of directors and management clearly understand the term "customers" in this context. This section provides a graphical representation of AAERT's customers.

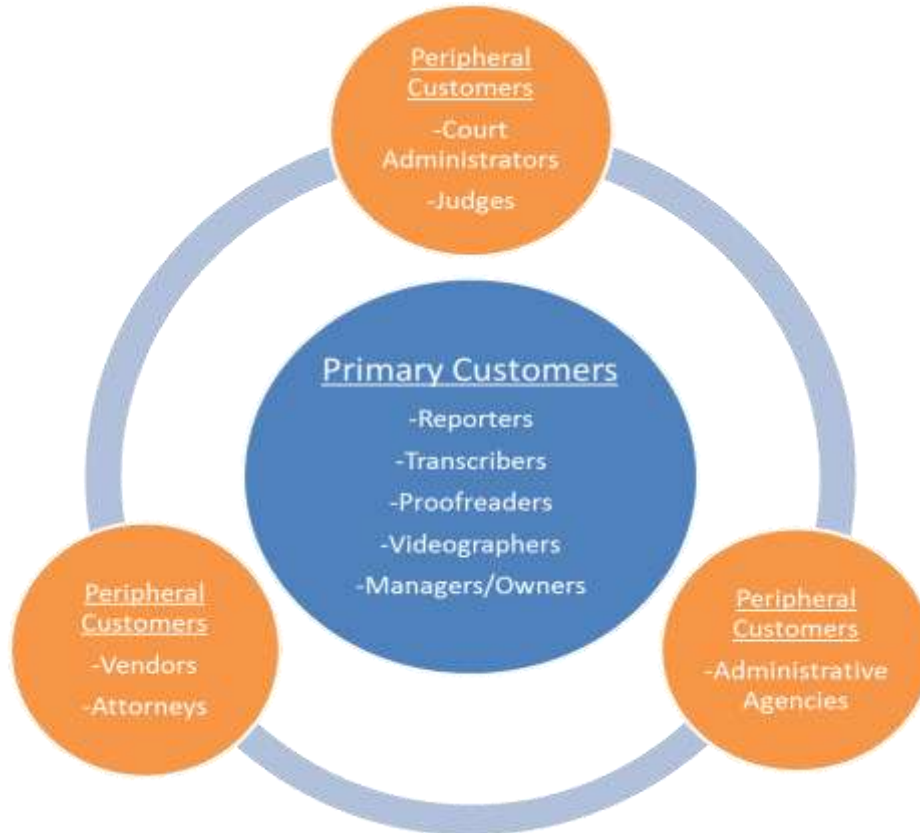
Key Definitions

-*Customer* : A person or entity that receives a product or a service for a fee.

-*Primary customer*: A person or entity that is the direct beneficiary of AAERT's offerings, the principal focus of the association's efforts and resources. The *primary customer* has the greatest influence on AAERT's direction and actions.

- *Peripheral customer*: A person or entity that is the indirect beneficiary of AAERT's offerings. The *peripheral customer* exerts influence and pressure on the *primary customer* and helps to shape the needs and desires of the *primary customer*, which influences the focus of AAERT's efforts and resources.

The following are a few examples of customers.



7.0 Summary of the Most Important Points in the Environment

State of the Industry

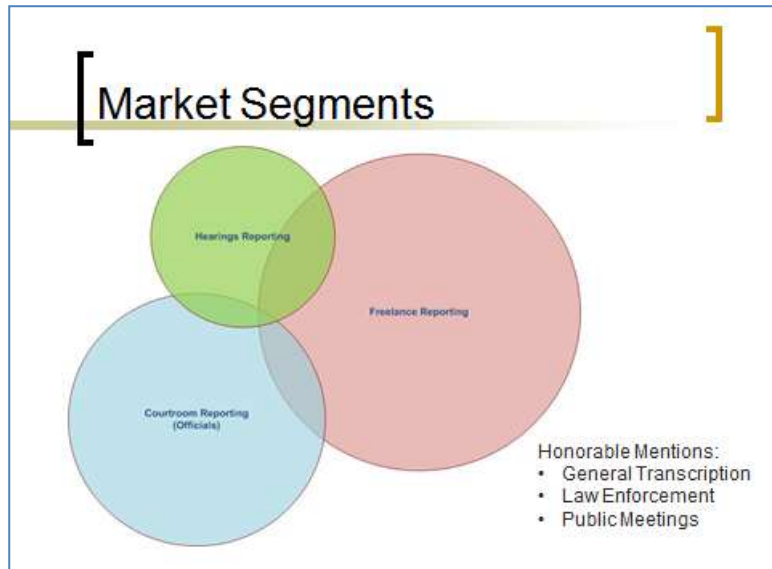
The PTF completed an environmental scan in 2010 and 2011 that included member surveys, analysis of member demographics, a review of other associations in the industry, and a comprehensive scan of trade journals and other media for information regarding current court reporting issues.

A framework was created to help define those market segments that best represent the court reporting market today specific to opportunities for AAERT members. The PTF identified traditional court reporting market segments, and then compared those segments to the business focus of the association's members.

While members perform reporting and transcription services for a variety of market segments, three stood out as primary business focus areas.

The freelance market (depositions), represents the largest segment of the total court reporting market. The segment is dominated by stenographic reporters and represents as much as two-thirds of the total market.¹

Agency hearing room reporting represents the smallest of the defined segments. Audio recording is commonly used in agency hearings. The segment represents approximately 10% of the total market.²



Judicial courtrooms represent approximately 25% of the total court reporting market. This is the segment that has experienced, and continues to experience, the greatest turmoil.

In the United States alone, these combined market segments represent between \$3.5 billion and \$6 billion of spending each year.³

What AAERT Members Do?

AAERT members offer court reporting services using audio and video recording technology, and transcribe proceedings that have been recorded by themselves or others.

97.3% of AAERT members use digital technology. Cassette tapes can still be found, but they are disappearing quickly.⁴ Interestingly, no AAERT members indicated that they use stenographic equipment to record proceedings. However, 17.4% of members reported that they use stenographic equipment to transcribe.⁵

The National Court Reporters Association, the largest association of stenographic reporters, says that 65-70% of its members operate in the freelance market.⁶ AAERT member survey data show that while AAERT members do work in all three segments, 87% work in or for the courts, with a large percentage working as independent contractors transcribing court proceedings.

42% of AAERT members report and/or transcribe agency hearings, although only 2% work solely in the agency hearing room market. There is currently little controversy in this market segment. The use of audio recording is quite common, but there is a lot of

¹ 2010 FIRM OWNERS ECONOMIC BENCHMARK SURVEY, National Court Reporters Association, 2011 – Page 6, Size of Market. Jim DeCrescenzo Chair, Firm Owners Community of Interest

² Bureau of Labor Statistic, U.S. Department of Labor

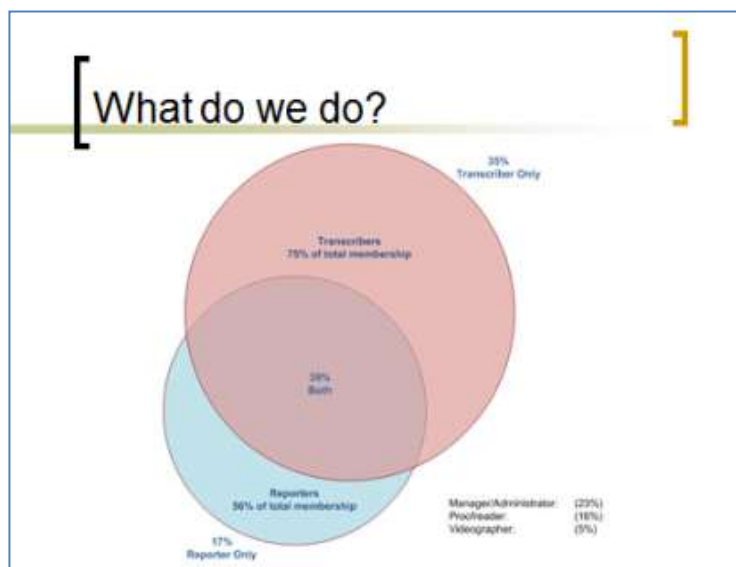
³ Multiple sources. Ibid 1, Ibid 2, Anything Research, www.anythingresearch.com, 2011 Premium Report on Court Reporting and Stenotype Services

⁴ AAERT member survey, 2011

⁵ Ibid

⁶ NCRA Membership Stats as of 12-31-2008, NCRA

cassette tape recording still being done. The challenge for this market over the next few years will be the transition to digital recording as analog recording systems become obsolete.



59% of AAERT members report and/or transcribe for the freelance market. However, once again, only 2% of members work solely in this market segment. The deposition market (freelance), is dominated by stenographic reporters. There is ongoing controversy regarding larger freelance firms entering into contracts with large users of court reporting services, such as insurance companies. Since there has been very limited penetration of digital reporting into the deposition room, controversy in

this market segment does not currently impact AAERT members very much.

Courtroom Segment

The courtroom segment represents 25-28% of the total market and somewhere between \$1.2 billion and \$1.5 billion of spending annually in the United States.⁷

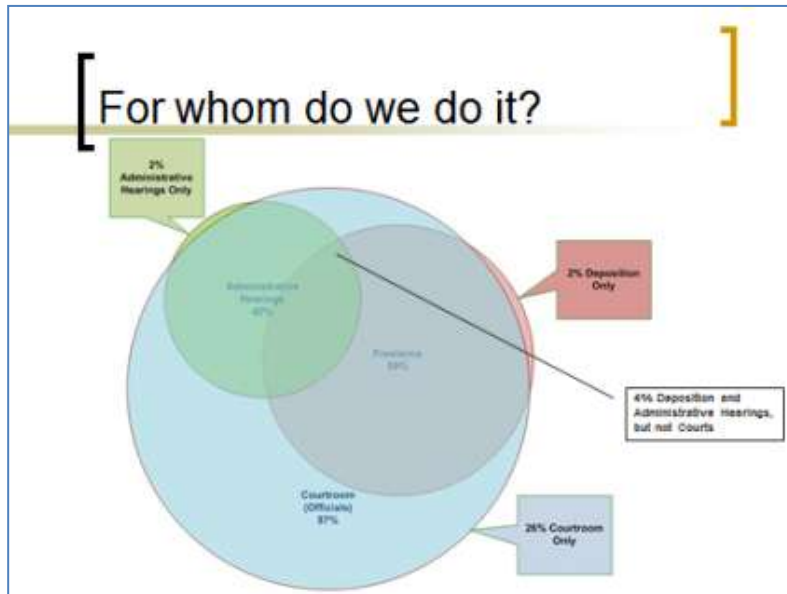
For decades courtrooms across the United States have been the main battleground between electronic and stenographic reporting. Court administration began introducing audio recording into the courts 50 years ago. Digital, first introduced into the courts in the 1990s, accelerated the courts' transition from stenography to audio recording. The recent global financial crisis, which has impacted court budgets dramatically, has further accelerated the transition to digital reporting.

The economic argument is simple and all independent studies by state courts and the federal courts have found electronic reporting to be less expensive and capable of producing transcripts of equal or higher quality than stenographic reporting.⁸ Projected cost savings are big. California's Legislative Analyst's Office, the state's nonpartisan fiscal and policy advisor, estimates a savings of \$113 million per year if the California courts would switch completely to digital reporting.⁹

⁷ Bureau of Labor Statistic, U.S. Department of Labor. 2011 estimated count of judges and magistrates - 27,000. This figure adds another 8,000 commissioners and pro tems.

⁸ Planning Task Force has tried to find all studies completed by the National Center for State Courts and all State and Federal Court committees. No report uncovered by the PTF, completed in the last 20 years, conflicts with this statement.

⁹ January 25, 2011, the 2011–12 Budget: Making Targeted Reductions to the Judicial Branch. California Legislative Analyst's Office - http://www.lao.ca.gov/analysis/2011/crim_justice/targeted_reductions_012511.aspx



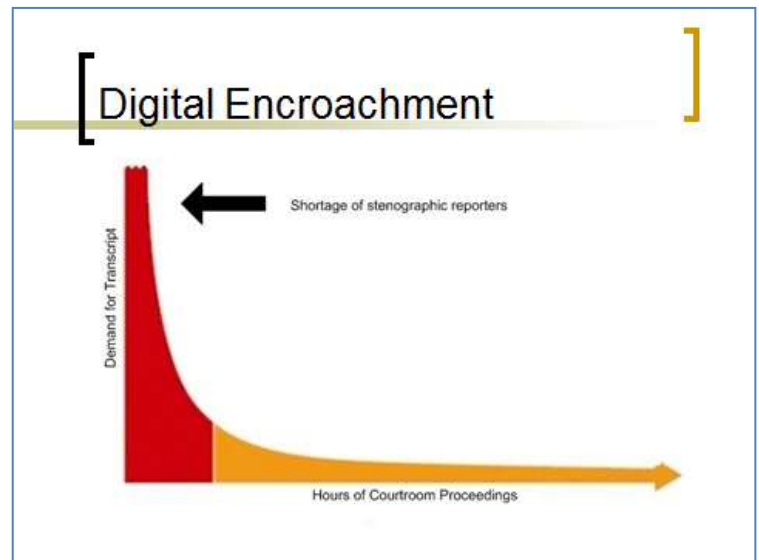
At this point, electronic reporting is used in every state in the United States and all provinces in Canada. Some states now use digital reporting as the exclusive method of capturing the court record including Alaska, Kentucky, New Hampshire, Utah, and Vermont¹⁰, plus a number of states use digital reporting to a much greater extent than stenography, including Oregon and Florida.¹¹

The courtroom is the primary growth market for AAERT

members, and it is growing quickly.

The Long Tail

This curve represents how recording and transcript demand occur in the courtroom market segment. The X axis along the bottom represents the total hours of court proceedings in the United States. The Y axis along the left side represents the demand for transcript. The types of proceedings commonly found on the left side of the curve involve matters that generate the most demand for transcript. Think of it as the simple 80/20 rule, where 20% of court proceedings generate 80% of the demand for transcript and vice versa.



When audio recording was introduced as a method of capturing the court record, it was first installed in courtrooms that generated very little demand for transcript, such as traffic, family, and probate courts. These were the least attractive rooms for stenographic court reporters, and court

¹⁰ Digital Audio/Visual Recording Technology (DART) Committee, Final Report & Findings, Submitted to the Iowa Judicial Council December 30, 2009 – Appendix 5, States That Use Electronic Recording Technology for Trial Court Proceedings*, (Updated: 10-21-09). Table prepared by: John Goerd, Deputy State Court Administrator, Judicial Branch Bldg, Des Moines, IA.

¹¹ *ibid*

administration garnered large savings with minimal resistance by replacing stenographers with a relatively inexpensive tape recorder.

During the 1970s and 1980s, tape recorders were used extensively to record proceedings from these large numbers of courtrooms hearing low level matters while generating very little transcript demand. This right hand portion of the curve is what author [Chris Anderson](#) called "The Long Tail," a term he popularized in his article in [Wired](#) magazine in October 2004.

The concept of the long tail has been used effectively to describe how companies such as [Amazon.com](#) and [Netflix](#) have come to dominate their respective markets by developing highly efficient distribution models that service long tail demand and put pressure on traditional business models that can only remain profitable by servicing just the top 20% of the demand curve.

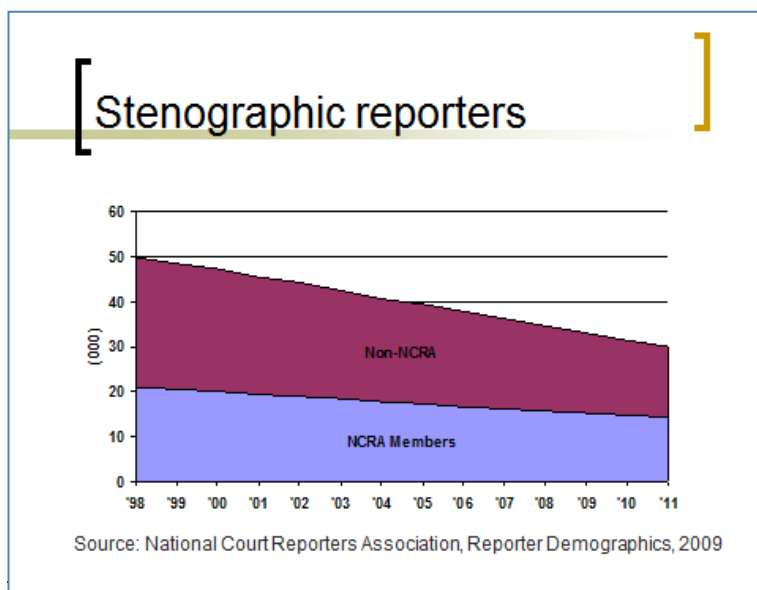
When digital court recording solutions were introduced in the mid-1990s, the increased efficiencies of the digital recording systems over the older analog tape technology allowed court administration to expand the use of electronic reporting into higher level courtrooms, threatening official stenographic reporters by installing the systems in courtrooms that had provided profitable income. These replacements served to heat up the battle between stenographic reporters and the proponents of electronic reporting.

The transition to digital reporting continues. As it does, the growth in the demand for court transcription is accelerating at a very rapid pace.

Research has identified three primary drivers that are working together to create the increasing demand.

Court Reporter Shortage

For years we have heard that there is a shortage of stenographic court reporters in the United States. Opponents of electronic reporting claim that the shortage is a myth. In some areas of the country that might be true. But look at the facts.



Since 1998, the total NCRA membership dropped from 21,000 to 14,500. Their best estimate of total stenographic reporter population in the United States dropped from 50,000 to 29,000 in the same time. That is a 30-40% drop in the number of stenographic reporters in just 12 years.¹²

From the same report, we learned that NCRA members aged 20-29 dropped from 2,700 in 1996 to just 1,134 in 2006.

¹² National Court Reporters Association, Reporter Demographics, 2009

That is a 58% drop in just 10 years.¹³ With the steepest decline in membership occurring within its youngest age group, it appears that the decline will continue. It will be very difficult to reverse.

This age specific statistic for NCRA is in stark contrast to AAERT member survey results that indicate the younger age groups are the strongest growth demographic for the association.

Matching this downward trend in stenographic reporter population is a rapid decline in the accredited schools that teach stenographic court reporting, the students enrolled in those schools, and the number of graduates. Between 1996 and 2006, the number of institutions teaching stenographic court reporting declined from 106 to 62. That is a 41.5% drop.¹⁴ The number of graduates declined from 901 in 1996 to only 351 in 2006. That is a 61% decrease.¹⁵ Based on the latest information, it appears as though steno schools may see only 200 students graduate in 2011.¹⁶

There is also a noted trend of official stenographic reporters leaving the courtroom to move into other market segments including the deposition market and closed captioning, making it more difficult for courts searching for a stenographic reporter.¹⁷

Acceptance of Digital Reporting

The second driver of increased court transcription demand is the broad acceptance of digital reporting as an effective method of capturing the court record.

Aside from the occasional study funded by NCRA, all court and *independent* research into the efficacy of digital reporting in the courtroom have proven the technology is highly reliable and cost efficient.¹⁸ All 50 states and the federal government use digital reporting in their courtrooms. Several states now use the method exclusively.¹⁹

The acceptance of digital reporting was accentuated at the end of 2009 when the Conference of State Court Administrators ("COSCA") issued a report titled "Digital Recording: Changing Times for Making the Record". After providing an extensive review of the current state of the court reporting market, the report's first recommendation was:

"State courts should move to digital recording as the method for making the verbatim record, with the possible exceptions for complex civil and capital criminal cases where real-time or stenographic reporting are specifically designated."

Court Budgets

¹³ Ibid

¹⁴ National Court Reporters Association, *Graduation Trends in NCRA-Certified Programs, 1996 to 2006*, available at http://ncraonline.org/NCRA/pressroom/reporting_school_graduation_trends.htm.

¹⁵ Ibid

¹⁶ NCRA Member Value Proposition, Blue Ocean Analysis and Recommendations, November 2007. Page 5 (education). www.blueoceanstrategy.com

¹⁷ Pete Wacht, *U.S. Legal/Medical Records Transcribed Offshore Pose Risks to Privacy Information Security*, NCRA Warns, National Court Reporters Association (Jan. 22, 2008)

¹⁸ Ibid 8

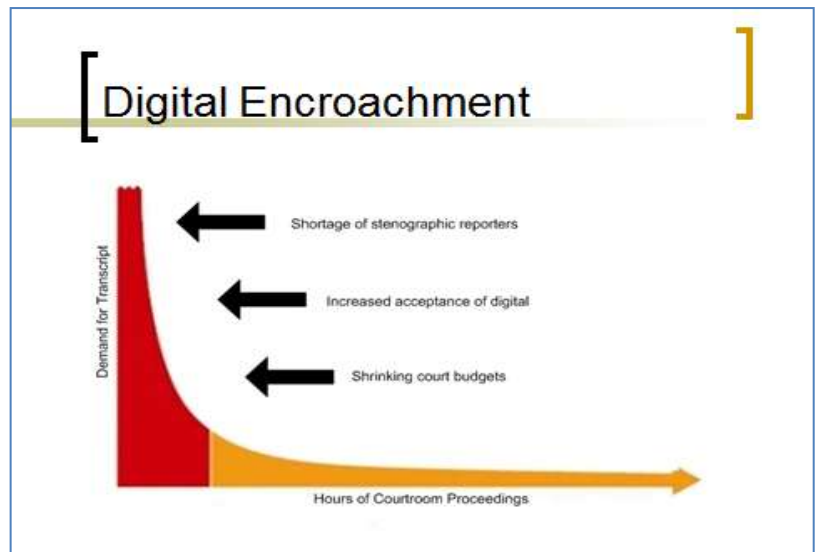
¹⁹ Ibid 10

The last and perhaps the most obvious driver for the move from stenographic to digital reporting is the current economic climate. Since the end of 2008, and probably well before that, courts across the country experienced increasing caseloads and shrinking budgets.

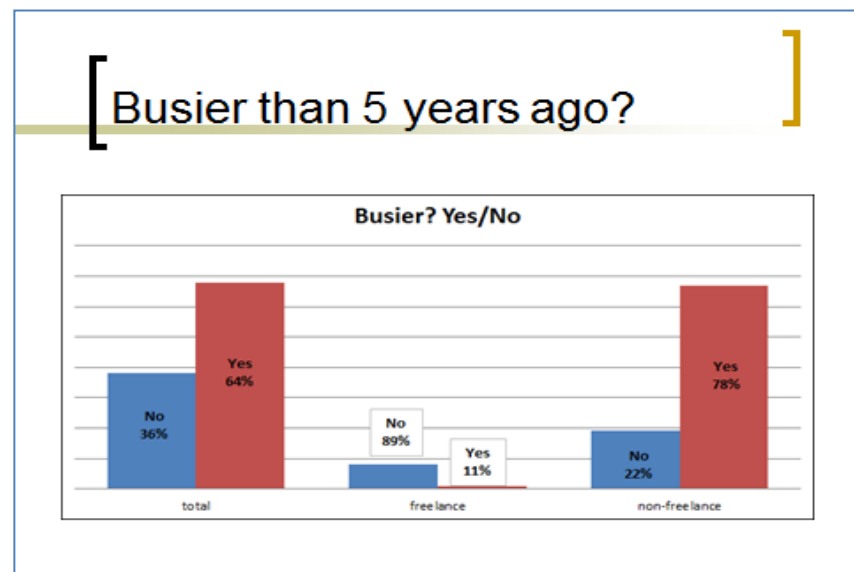
For most court systems, these are the most difficult budgets they have ever had to manage. It does not appear as though things will improve for some time. Replacing stenographic reporters with digital reporting is an obvious opportunity to save money without harming the quality of service to judges, lawyers, and the general public.

Inflection Point

The forces driving courts to move to digital reporting is only part of the story. All indications are that adoption of digital reporting has placed the court transcription industry at the inflection point between the 80 and the 20. The long tail has been consumed by digital reporting and the courtrooms that are now beginning to transition to digital reporting are sitting in the head of the curve. The shape of the curve creates an amplifying effect. A courtroom in the long tail that adopted digital reporting in 2004 would generate demand for X number of pages of transcript. Courtrooms in the head of the curve that are transitioning today generate demand for 10 times X pages.



If this research is accurate, then AAERT members will be seeing the first wave of this rising tide of transcript demand. The PTF asked members if they were busy right now. Despite being in the worst economy in decades, members said they were very busy.



64% of all members said they were busier now than they were five years ago. When answers were isolated to those members not dedicated to the freelance or hearing room markets, nearly 80% of the association's members say they are busier than they were five years ago.

Below are examples of comments received from

member surveys. When members said they were less busy, it was by choice or that they had not been in the business for five years. This validates our theory that demand is beginning to accelerate as we would expect.

“More work than I’ve ever had and I’ve been a transcriptionist for 31 years”

“Never out of work or even slow re transcription.”

“More transcript requests from courts. Longer transcripts and faster turnaround times.”

“We have definitely gotten busier as far as court work.”

“I prepare lengthier transcripts, the majority of which are criminal jury trials that are appealed.”

“5 years ago I was a freshman in college.”

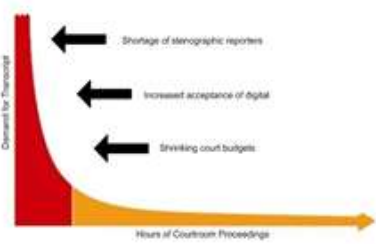
“I was not in the field five years ago.”

“Many more occasions of me referring work to other AAERT-certified transcribers because I simply can’t do all of the jobs that come my way – at least not and still manage to keep up with minor things such as sleeping, eating or acknowledging my family’s existence...”

Implications

Implications

- Court transcript demand ↑ exponential
- Transcripts from ER will be longer
- Greater scrutiny
- Faster TATs
- More \$



So how will this all affect AAERT members?

They can expect continued and even accelerating growth in the demand for transcript coming from courtrooms that use digital recording.

Transcripts will be longer because of the types of cases now being recorded with digital systems.

Matters being digitally recorded and transcribed will be higher level cases than they might have seen in the past, which

likely means greater scrutiny of the transcripts.

Again, because of the types of cases being recorded, attorneys will demand faster turnaround times ("TATs") and additional services. This should translate into higher pay for members who are able to step up to the new standards.

8.0 SWOT

In 2011 the AAERT bboard conducted a SWOT analysis. It was an intensive exercise to review (1) the internal factors (strengths and weaknesses) of which AAERT has some measure of control, and (2) the external factors (opportunities and threats) of which AAERT essentially has no control.

The board identified the following strengths, weaknesses, opportunities, and threats.

AAERT SWOT Analysis

<p>Strengths:</p> <ul style="list-style-type: none"> • Well recognized / web presence • Solid reputation / strong principles • Resilient / financially stable • Diverse membership • Dedicated active members • Comprehensive certification program • Strong relationship with technology partners 	<p>Weaknesses:</p> <ul style="list-style-type: none"> • Volunteer leadership; lack of leadership development • Volunteer committee members with time limitations; uninvolved members • Minimal fluctuation or stagnate membership growth; poor retention • Few education programs and membership benefits • Diverse membership • Combating legislative issues • Inactive research for additional financial resources • Few vendor members
<p>Opportunities:</p> <ul style="list-style-type: none"> • Increase domain exposure; social media • Capitalize on court budget issues • More courts requiring certification • Large, untapped potential members: displaced stenographers; dissatisfied NCRA members; stenographers who embrace digital reporting • Additional member benefits • Proactive search for alternative funding • Emerging technologies • On-line education and certification • Increase member involvement 	<p>Threats:</p> <ul style="list-style-type: none"> • Member financial situation • Emerging technology and costs • Knowledge of software development • Rival organizations (NCRA, NVRA, state associations) • Legislative issues • Improper use of digital recording systems (unmonitored recording)

As a result of the SWOT analysis, the AAERT Board can choose to pursue offensive strategies that play on the strengths and opportunities of the association, or defensive strategies that play on the weaknesses and threats to the association. The following page contains some examples of possible offensive and defensive strategies.

SWOT - analysis		Internal Analysis	
		Strengths	Weaknesses
External Analysis	Opportunities	<p><i>S-O-Strategies:</i></p> <p><i>Leverage AAERT's respected name and certification programs to promote the trend in courts to require certification.</i></p> <p><i>Build on AAERT's history of technical innovation by attracting members with specific technical knowledge to promote AAERT's reputation of technology leadership.</i></p>	<p><i>W-O-Strategies:</i></p> <p><i>Capitalize on the current budget crisis in the courts to lobby for changes in rules and legislation that inhibit use of digital recording.</i></p> <p><i>Partner with technology providers to accelerate the introduction of effective digital recording and transcription solutions.</i></p>
	Threats	<p><i>S-T-Strategies:</i></p> <p><i>Leverage AAERT's domain expertise to promote best practices in courtroom digital recording and transcription.</i></p> <p><i>Offer attractive membership benefits to stenographic reporters wishing to leave the NCRA and find a growing association in a growing segment of the court reporting market.</i></p>	<p><i>W-T-Strategies:</i></p> <p><i>Develop an effective government relations effort to combat continued threats to the implementation of digital recording.</i></p> <p><i>Partner with technology providers to encourage cost effective technology solutions for members.</i></p>

9.0 Strategic Direction

In an effort to increase the value of the organization to its membership and its community, AAERT will direct its strategic efforts in the following areas:

Education

AAERT will concentrate on providing an ongoing, comprehensive program designed to inform and educate its constituency (members, customers, etc.) on the matters that have the most impact on our profession and our industry. We will employ the most effective and efficient methods of delivering content necessary in this effort. Innovative methods such as distance learning and other similar interactive technologies will give members an opportunity to participate in a variety of ways. Focusing on meeting the needs of the member will lead to active and enthusiastic participation which will, in turn, lead to a successful education program.

Certification

AAERT will regularly review and enhance its value as the premiere certification body in the electronic reporting and transcription industry. The program will constantly evaluate its effectiveness in providing a widely accepted, highly regarded endorsement of the skills and experience of those holding the certification. The requirements of the program will accurately reflect the variety of needs within the industry we serve while at the same time give ample opportunity for certification applicants to achieve success. The program will strike the right balance between comprehensiveness and fairness.

Networking

AAERT will promote opportunity for member interaction for the purposes of skill enhancement, problem solving, peer evaluation, educational and employment opportunities and various other benefits professional networking can provide. Conventional means such as conferences will continue to be a high priority, but other methods will also be pursued. For example, social media portals and other similar technologies will be evaluated as vehicles for enhancing interaction not only with members but with other customers we serve in the industry.

Public Awareness

AAERT will conduct a vigorous effort to inform the public of the numerous benefits of digital reporting. A variety of methods can be employed toward this end. Advertisement campaigns in various industry publications will be considered based on cost and effectiveness. Local members can conduct seminars in their regions. Informative articles can be submitted to media outlets including social and professional sites such as LinkedIn. Industry conferences and conventions provide excellent opportunities for communicating the facts about digital reporting and transcribing. Since a significant portion of our work is conducted in the public sector, government relations activities will be a key component of this program. Contact with industry associations such as the National Association for Court Management and National Center for State Courts will increase AAERT's visibility within the scope of government decision makers. Judicial

awareness campaigns can be directed toward organizations such as the National Association of Women Judges or the National Judges Association.

10.0 Goals Areas

The association has created a set of standing committees that are responsible for establishing specific goals and objectives consistent with the strategic direction of AAERT. Following are the goals and objectives of each committee. Specific initiatives designed to achieve these stated goals and objectives will be developed and executed by the individual committees.

The Certification Committee will provide AAERT members with electronic court reporting and transcription certification testing. The Certification Committee scores the certification tests using a two-step process and updates all certification-related materials.

The Communications Committee will report on events and happenings within the association as well as within the industry by research or two-way communication (interviewing and storytelling); will alert members about upcoming events; will report to members on “how to” insights, techniques, procedures, software and hardware to strengthen member knowledge and expertise; to build excitement in the AAERT community; and will promote AAERT as the premier association for digital reporting and transcribing.

The Education Committee will identify subject matter and designs and produces educational material that reach beyond certification to create further comprehension and professionalism in the fields of electronic reporting and transcribing. Members of the Education Committee will meet monthly to discuss training needs within the industry and to determine the best forum by which AAERT can provide educational materials to membership.

The Conference Committee will research and help organize annual conference content and locations, including the viability of regional workshops.

The Membership/Marketing Committee will identify and review membership value, needs, and benefits, and explore ways to retain, promote, and increase membership.

The Government Relations Committee will represent, promote, and advocate for the interests of the association with regard to policies, laws, regulations, and other developments that may affect the association and its membership. The Government Relations Committee will monitor all federal and state legislation, regulatory, and judicial developments that may affect the association, and advise the association board and the membership about these issues. In response to identified issues or proposed legislation, the Government Relations Committee will contact and inform policy makers at the national and state levels in an effort to educate and promote the interests of the association.

The Non-dues Revenues Committee/Task Force will refine current revenue streams, identify new revenue streams, and then prioritize and create strategies to bring these non-dues revenue streams to fruition.

Objectives

Certifications & Education

The AAERT will provide:

A. Certifications

1. Expand availability of basic certification testing by offering online testing and a greater number of regional testing opportunities
2. Promote the affiliation of AAERT certification with state certification requirements to enhance the value of certification to AAERT members and the legal community.
3. Create and offer enhanced or advanced certifications including advanced reporting, advanced transcription, transcript management, audio/video content management, audio specialists, video specialist, proofreader, and management skills certification.

B. Education

1. Create a system to share and develop information.
2. Create a system for members to easily share knowledge transfer / topic specific / reviewed / posted / disseminated. Education is not to educate on best practices. It is continuing education. They should use the Best Practices Guide as a *guideline*. It could be, for example, how to deal with the public or how to choose microphones.

Member Networking

The AAERT will provide:

A. Online Social Networking

1. AAERT website opportunities
2. Integration with other social networking such as YouTube, Twitter, LinkedIn.

B. In Person

1. Regional and annual members conferences. Explore in person opportunities, including on-line.
2. Special interest groups: For example, business owners. Consider in person opportunities with special interest groups as a way to bring people together.

Partnering relationships and opportunities. Interaction with the public by attending tradeshows and promoting AAERT.

Promoting the Value of Digital Reporting

The AAERT will provide:

A. Legislative Initiatives

1. Establish regular communications with federal and state committees.
2. Promote grassroots involvement with members on state initiatives. Create a basic toolkit for proactive groups.
3. Leadership conferences and training. Provide toolkit to assist other states.

B. Content Marketing

1. Online/social media activity; post, re-post industry related articles
2. Trade media
3. Conduct studies or surveys

C. Partnering

1. Ambassador programs which will consist of designating individuals from within AAERT to attend conferences or identify individuals within organizations such as NACM or NCSC to educate others about AAERT and serve as ambassadors for AAERT within their organization.
2. Inter-association activities (NACM, NCSC)

11.0 Conclusion

All industries face disruptive forces from time to time. However, it is not often that an industry faces a confluence of forces that all point to rapid and dramatic shifts such as we expect in the court reporting market. Technology improvements combined with long-term demographic trends and a sudden change in the economic imperatives for courts, law firms and private litigants will accelerate the adoption of digital recording in all traditional court reporting markets. These forces are highly disruptive and will create both huge risks and huge opportunities. Individuals and companies prepared to take on the challenges will thrive in this new competitive landscape. Those that are not prepared will struggle.

AAERT has an important role to play in this transition. The association's leadership has identified the need to plan for success in the changing markets and has positioned the association well for future growth. The Planning Task Force appreciates the support provided by the Board over the last two years and looks forward to working with the association, this Board and future AAERT Boards as we take on the challenges and pursue the exciting opportunities before us.